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Foreign Crops and MARKETS

VOLUME 57 NUMBER 24

World Summaries:

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FOR RELEASE

MONDAY

DECEMBER 13, 1948

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Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

The Belgian Government has restored to private channels trade in all grains except wheat. Importers of cereals other than wheat will obtain foreign exchange by declaration instead of license. Economic Missions will purchase these grains only if the Belgian market is insufficiently supplied. Belgium was the second largest U.S. market for corn before World War II. Recently, Belgian private traders have purchased corn from Hungary and Yugoslavia.

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Canadian exports of slaughter and feeder cattle to the United States for the week ending December 8, totaled 7,594 head compared with 6,858 for the previous week, bringing the total to 232,906 head since August 16. Beef and veal exports for the week ending December 4, totaled 5,113,921 pounds compared with 4,435,762 pounds the previous week, bringing the total to date to 73,043,411 pounds.

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The second official estimate places Egypt's 1948 cotton crop at 1,772,000 bales compared with the first estimate of 1,722,000 and a final estimate of 1,314,000 for 1947. Most of the increase was in the Ashmouni and Zagora varieties, the shortest of the Egyptian staples. The second 1948 estimate includes 483,000 bales of extra long staple cotton, 244,000 of which were of the Karnak variety. All except about 60,000 bales of the remaining 1,289,000 bales are Ashmouni and Zagora. The 1947 estimate includes 304,000 bales of extra long staple, above 1-3/8 inches (267,000 of which is Karnak), 30,000 bales 1-1/4 to 1-3/8 inches, 956,000 of Ashmouni and Zagora 1-1/8 to 1-1/4 inches, and 30,000 of unclassed cotton (scarto).

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WORLD SOYBEAN PRODUCTION ESTABLISHES NEW RECORD [1]

Indications point to a new record in world soybean production. A preliminary estimate of the Office of Foreign Agricultural Relations places the 1948 output at approximately 575 million bushels. The revised estimate for 1947 is 503.3 million bushels. The United States, the second largest producer, and Canada harvested record crops. Increases over 1947 also occurred in China, the principal producer, and in a number of other countries. On the other hand, the Manchurian crop is smaller.

Canadian farmers have harvested their largest soybean crop. The November estimate was 1.7 million bushels of soybeans from 94,000 acres compared with 1.1 million bushels (revised) and 61,000 acres in 1947. Ontario is the only province reporting commercial production at this time.

The Canadian Government is desirous of increasing soybean production sufficiently to replace imports of edible oils. The Ontario Agricultural College has done considerable extension work with farmers in promoting soybean culture.

During the 1947-48 crop year (August-July) Canada imported 1,075,000 bushels of soybeans, 5,876,200 pounds of oil (653,000 bushels in terms of beans), 2,800,000 pounds of soybean flour, and 24,200,000 pounds of cake and meal, all from the United States with the exception of a few beans from China. Soybean prices at Toronto were around $2.25 per bushel in October, $1.00 less than a year earlier.

United States 1948 soybean production, estimated at 210.5 million bushels on November 1, is a record for this country, surpassing the previous peak output (1946) by almost 5 percent and the 1947 outturn by 16 percent. This year's soybean crop was harvested from 9.9 million acres, more than 1 million less than in 1947, but the yield of 21.3 bushels per acre was the highest yet attained. Illinois with a yield of 24 bushels accounted for well over a third of the total. Indiana and Iowa also had exceptionally large yields.

The 1948 soybean production in European countries appears to have been negligible. Hungary reports a crop of 90,000 bushels, 11 percent above that of 1947. Italian soybean production was only 103,000 bushels compared with 150,000 last year.

According to recent information, Asiatic soybean crops are larger than in recent years but not equal to prewar output except in China and Turkey.

China's 1948 soybean crop of 210.8 million bushels is the largest since the middle 1930's, despite a 3-percent acreage reduction from 1947. China (excluding Manchuria) is the world's largest soybean producer and consumes the greatest quantity as food or in the preparation of food products.

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[1] Additional copies of this article may be obtained from the Office of Foreign Agricultural Relations.

The 1948 estimate for Manchurian soybean output is not available. It seems quite likely, however, that production will be less than the small harvest of 119 million bushels a year ago. There has been a tendency to divert to foodgrains land normally planted to soybeans chiefly because of the difficulty in marketing the beans. Typhoon and floods in some parts of the country probably reduced the crop.

Exports of soybeans and products in terms of beans totaled only 532,000 bushels during the crop year (October-September) 1947-48 compared with 103,069,000 during the 5 years ending September 1939.

Japanese soybean production has increased annually since 1945 but has not reached the prewar average. The 1948 estimate of 8.7 million bushels is 1.6 million bushels larger than in 1947.

Soybean production in South Korea showed a marked increase in 1948. The preliminary forecast is 9.3 million bushels against 4.9 million last year. The crop produced in this part of Korea is now utilized within the country. It is estimated that about 40 percent is consumed on farms and a large percentage is used in the manufacture of soya sauce, paste, and other edible products.

Netherland's Indies (Java) soybean production has gradually recovered from the low output of 2.2 million bushels in 1945, and the 1948 crop is estimated at 7.7 million or only 20 percent less than the 1935-39 average. A larger crop was anticipated but drought reduced the yield in some areas and several thousand acres were destroyed by rodents. No exportable surplus will be available from the current crop.

Turkey has increased soybean production during the past 2 years. The 1948 forecast is 70,000 bushels compared with 55,000 last year and 16,000 in 1946. Apparently soybeans are grown chiefly for export since 36,000 bushels were shipped during January-May 1948, and 18,000 bushels in 1947.

Brazil has grown soybeans for more than a decade, but production was negligible until the past 2 years when there was a marked increase, especially in Rio Grande do Sul. The 1948 crop for all Brazil is estimated at 690,000 bushels compared with 480,000 in 1947 and 147,000 in 1946.

Only 2 countries in Africa appear interested in growing soybeans. Tanganyika's production amounted to 15,000 bushels in 1946, then dropped to 8,000 the following year but rose to 53,000 in 1948. Of this year's crop 35,000 bushels have been designated for export, probably to the United Kingdom.

Soybean production in the Union of South Africa has not been reported for 1948. In 1947, however, the output was 933,000 bushels compared with 56,000 a year earlier, which indicates an increasing interest in the crop.

(Text Continued on Page 479)

SOYBEANS: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1945-48

Continent and country	Acreage					Yield per acre					Production				
	Average 1935-39	1945	1946	1947	1948 1/	Average 1935-39	1945	1946	1947	1948 1/	Average 1935-39	1945	1946	1947	1948 1/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA:															
Canada	2/ 10	46	59	61	94	20.7	18.3	18.1	18.2	17.9	2/ 207	844	1,072	1,110	1,683
United States 3/	3,042	10,661	9,806	11,125	9,900	18.5	18.0	20.5	16.3	21.3	56,167	192,076	201,275	181,362	210,475
EUROPE:															
Bulgaria	34	17	45	70	-	12.1	3.3	5.2	3.4	-	416	55	234	240	-
Hungary	4/ 7	6	5	8	6	16.9	8.6	10.4	10.1	15.1	4/ 125	48	56	81	90
Italy	5/	2	2	7	5	12.1	15.4	15.8	20.9	22.8	2/ 1	32	27	150	103
Rumania	2/ 49	-	-	-	-	9.5	-	-	-	-	2/ 463	-	-	-	-
U.S.S.R. (Europe and Asia)	4/ 607	-	-	-	-	-	-	-	-	-	4/ 5,805	-	-	-	-
ASIA:															
Turkey	4/ 1	2	-	5	4	29.0	9.0	-	10.8	15.7	4/ 37	18	16	55	70
China proper (22 provinces) 6/	12,411	9,967	11,599	11,641	11,309	16.7	16.4	17.0	17.3	18.6	207,566	163,287	196,610	201,322	210,820
Manchuria	8,992	8,167	7,187	6,662	-	16.8	15.6	17.1	17.9	-	151,294	127,749	122,639	119,059	-
Japan	2/ 812	684	573	607	598	15.4	9.6	13.3	11.8	14.6	12,499	6,551	7,532	7,161	8,760
Formosa	2/ 17	-	-	-	-	8.9	-	-	-	-	2/ 151	-	-	-	-
Korea 7/	2/ 1,921	661	625	650	845	10.0	7.5	8.1	7.7	11.0	17,554	5,007	5,083	4,982	9,273
Netherlands Indies 8/	889	321	583	700	-	10.9	7.0	7.6	9.6	-	9,731	2,247	4,406	6,719	7,716
AFRICA:															
Tanganyika	-	-	-	-		-	-	-	-	-	-	15	15	8	53
Union of South Africa	-	-	9	-	-	-	-	6.5	-	-	-	-	56	933	-
World total 9/	29,100	31,400	31,400	32,500	31,200	-	-	-	-	-	464,300	503,800	545,100	530,300	574,800

1/ Preliminary. 2/ Average of less than 5 years. 3/ Acreage harvested for beans. 4/ One year only. 5/ Less than 500 acres. 6/ Partly estimated. 7/ Beginning with 1945 figures represent South Korea only. 8/ Java and Madura. 9/ Includes estimates for the above countries for which data are not available and for minor producing countries.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of United States foreign service officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present boundaries, except as noted.

SLIGHTLY LARGER WORLD CACAO BEAN PRODUCTION FORECAST

World production of cacao beans for the 1948-49 season will be slightly larger than 1947-48 but still below the 1935-39 average, according to early-season forecasts. The current production, forecast at 1,413,000,000 pounds, compares with a revised 1947-48 production of 1,352,000,000 pounds and the 1935-39 average of about 1,579,000,000 pounds.

Production in Africa, which normally produces about two-thirds of the world crop, is forecast at 943,000,000 pounds compared with 884,000,000 for 1947-48. Weather conditions generally have been more favorable for the 1948-49 crop than they were for the previous one. Despite the spread of swollen-shoot disease in the Gold Coast, it appears that the current crop will exceed the 1947-48 outturn. Although crops in the French Colonies are forecast somewhat higher than last year, new laws regarding grading of cacao for export may prevent exportation of all the cacao produced. Production in Asia and Oceania, forecast at 15,800,000 pounds, would exceed last season's outturn by about 2,000,000 pounds. Western Hemisphere production, placed at 455,000,000 pounds, would be slightly more than in 1947-48.

Africa. Production in the Gold Coast, forecast at 500,000,000 pounds, would be the largest crop in the postwar period, although below the 1935-39 average of over 600,000,000 pounds annually. The forecast for a larger crop this season is based on reports of more favorable weather conditions and the fact that new trees are beginning to bear in Ashanti where swollen-shoot is not so prevalent as in the Eastern Province.

Swollen-shoot disease continues to spread in the Gold Coast. For the present, the compulsory cutting-out program has been abandoned as a result of local opposition. Cacao trees infected with swollen-shoot are being destroyed only when requested by the farmers. The situation is not encouraging. In areas where swollen-shoot has devastated a large part of the cacao acreage, farmers are willing to have infected trees destroyed, but they object in areas where the disease is just beginning on account of the loss in income. Inasmuch as the disease is spread from tree to tree by insect vectors, the cutting-out method of control cannot be effective unless infected trees are destroyed promptly.

Nigeria's 1948-49 crop is forecast at 200,000,000 pounds and compares with the previous season's low outturn of about 170,000,000 pounds. Excessive rains last season were mainly responsible for the low 1947-48 outturn. Weather conditions have been much more favorable for the 1948-49 crop, and it appears that at least 200,000,000 pounds of cacao beans will be harvested. Very little swollen-shoot disease is found in Nigeria.

Information on current cacao production in French Colonial areas of Africa is very limited, but all indications are that the crops will be larger than during the previous season. Forecasts of 1948-49 Ivory

Coast production vary from 80,000,000 to 97,000,000 pounds. The combined crops in the French Cameroons and French Equatorial Africa are expected to total at least 100,000,000 pounds. Cameroon cacao is frequently of low quality, however, owing to inferior methods of curing, and a large part of the output probably will fall below export standards put into effect for the first time this season. The dispostion of beans considered unfit for export is not known.

No forecast is available concerning the 1948-49 cacao crop in the Belgian Congo, but indications are that it will exceed the 1947-48 outturn of 3,500,000 pounds. As a result of high world cacao prices, attempts are being made to increase the Congo's production. During 1947 about 2,500 additional acres were planted to cacao, and new plantings have continued in 1948. Experiments are in progress to determine conditions under which optimum yields may be obtained. A large palm oil company is successfully growing cacao between the rows of palm oil trees.

The Americas: The Bahia Cocoa Institute forecasts 1948-49 production in the State of Bahia, Brazil, at 209,000,000 pounds. Production in the States of Amazonas, Para, and Espirito Santo is placed at 9,000,000 pounds, making a total of 218,000,000 pounds for all of Brazil, compared with 225,000,000 pounds in 1947-48. The 1948-49 midcrop in Bahia was considerably less than the previous season's mid-crop, which largely accounts for the smaller Brazilian crop.

A crop of 65,000,000 pounds is forecast for the Dominican Republic in comparison with 62,000,000 pounds in 1947-48. The mid-crop, normally harvested from October to February, is late this season with heaviest picking expected in December or January.

Ecuador's production is expected to exceed slightly the 1947-48 outturn of 35,000,000 pounds. No permanent reversal of the downward trend in production is likely, however, owing to the prevalence of witches'-broom disease and the paucity of new plantings.

The 1948-49 crop in Costa Rica, forecast at 13,000,000 pounds, compares with about 12,000,000 pounds in the previous season. The 1948-49 main crop is late with harvesting starting in mid-November instead of early October. During recent years, experimental plantings of cacao were made on Costa Rica's Pacific Coast near Quepos. It now appears that the success of the venture will result in additional plantings in the area.

Information is not available concerning the size of the current crop in Venezuela, but it may be expected that the harvest will equal approximately the previous season's, in view of favorable prices and efforts being made by the Venezuelan Government to increase production.

(Text continued on Page 478; table follows)

CACAO: Estimated production 1/ of cacao beans in principal producing countries, average 1935/39, annual 1946/47 - 1948/49.

Country	Average 1935/39 2/	1946/47	1947/48 3/	1948/49 3/
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH and SOUTH AMERICA				
Costa Rica	14,356	8,400	12,000	13,000
Mexico	2,500	12,000	15,000	15,500
Panama	10,418	6,500	6,600	6,500
Cuba	7,000	6,000	7,000	7,000
Dominican Republic	54,049	69,500	62,000	65,000
Haiti	3,349	4,000	4,400	4,500
Jamaica	4,750	4,160	4,000	4,500
Grenada	8,536	5,700	6,000	6,000
Trinidad & Tobago	31,635	8,435	11,000	11,500
Brazil	263,980	321,000	225,000	218,000
Colombia	25,000	24,250	24,250	25,000
Ecuador	42,373	35,000	35,000	36,500
Venezuela	36,934	38,000	40,000	40,000
Other 5/	1,307	1,350	1,350	1,450
Total	506,187	544,295	453,600	454,450
AFRICA				
Belgian Congo	2,809	2,500	3,500	3,600
French Cameroons & Equatorial Africa	60,221	85,000	97,000	100,000
Ivory Coast & Dahomey	109,937	79,365	75,000	80,000
Gold Coast & Togo	609,363	430,000	475,000	500,000
Nigeria & Cameroons	216,318	246,000	170,000	200,000
San Thome & Principe	22,496	20,000	18,000	16,000
Spanish Guinea	25,000	29,000	37,000	35,000
Other 4/	8,727	7,485	8,420	8,350
Total	1,054,871	899,350	883,920	942,950
ASIA and OCEANIA				
Ceylon	7,931	5,000	4,600	5,500
Netherlands Indies	3,310	1,000	1,000	1,300
New Guinea	398	400	400	400
New Hebrides	3,916	3,100	3,000	3,000
Western Samoa	2,326	6,000	5,000	5,600
Total	17,881	15,500	14,000	15,800
Grand Total	1,578,939	1,459,145	1,351,520	1,413,200

1/ Production in Brazil is given for the 12 months May 1 - April 30. Production in most of the other countries is given for the 12 months October 1 - September 30.
2/ Export data have been used for all countries with the exception of Mexico, Cuba and Colombia. 3/ Preliminary.
4/ Includes Sierra Leone, French Togoland, Madagascar, and Angola.
5/ Includes El Salvador, Nicaragua, and Dominica.
Compiled or estimated from official statistics of foreign governments and United

WORLD OATS AND BARLEY CROPS REVISED UPWARD

World production of barley and oats in 1948 is now estimated to be slightly larger than forecast in October, according to latest information of the Office of Foreign Agricultural Relations. The oats crop is now estimated at 4,335 million bushels, compared with the earlier estimate of 4,290 million bushels. (See Foreign Crops and Markets, October 18.) There is no change in the previously estimated world barley figure of 2,425 million bushels. The world total for these two grains is slightly above average since the barley outturn was a little above the 1935-39 level and oats only fractionally below that average. Each crop was larger than the small 1947 harvest by over 10 percent.

The principal change entering into the net increase of 45 million bushels for oats was the increase of 48 million bushels in the European total. Other than that, the downward revision of 4 million bushels in the total for North America was the only significant change.

Oats production of 1,853 million bushels in North America was about a fourth larger than in 1947 and a third above the prewar average of 1,384 million. Most of the increase was in the United States, but Canada also had a large crop. North American barley production of 478 million bushels exceeded 1947 production by 12 percent and the prewar output by nearly one-half. In both the United States and Canada, barley acreage and yields per acre were substantially above prewar.

Europe's estimated total oats production of 1,368 million bushels was above 1947 by about 175 million bushels, but 240 million below the 1935-39 average. The crop of 235 million bushels in France was only about three-fourths of prewar, while the United Kingdom produced nearly one-half more. The European barley total, now placed at 635, million bushels, is 14 percent above 1947 and within 5 percent of the 1935-39 average.

Near-average (1935-39) yields are still indicated for the Soviet Union. Acreage somewhat smaller than during that period, however, is believed to have brought the total outturn considerably below average.

In Asia the oats estimate of 100 million bushels is considerably above 1947, and a little above the prewar average. Barley production, now placed at 748 million bushels, is slightly above 1947 but slightly below prewar. China with 354 million bushels has about an average crop, as has India with 102 million.

Africa's total oats production remains estimated at 26 million bushels. The barley crop estimated at 127 million bushels, is much above 1947 and slightly above the 1935-39 average.

Estimates for Southern Hemisphere countries have changed very little. Harvests are now in progress there, and while there are no official estimates available, indications point to above-average crops of both

(Text continued on Page 479;
tables on following pages)

BARLEY: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1946-48 a/

Continent and country	Acreage b/				Yield per acre c/				Production			
	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:												
Canada	4,291	6,258	7,465	6,495	20.7	23.8	18.9	23.8	88,882	148,887	141,372	154,643
Mexico	374	421	423	418	10.6	12.9	13.6	13.2	3,960	5,448	5,741	5,512
United States	10,817	10,411	10,947	12,177	22.1	25.2	25.5	26.1	238,622	262,258	279,182	317,240
Estimated total e/	15,490	17,090	18,840	19,090	-	-	-	-	332,000	417,000	426,000	478,000
Europe:												
Austria	401	310	300	295	32.6	20.0	20.7	26.4	13,087	6,200	6,200	7,800
Belgium	74	170	237	210	48.2	47.6	42.2	52.4	3,570	8,100	10,000	11,000
Bulgaria	676	554	725	-	25.7	23.5	16.6	-	17,400	13,000	12,000	-
Czechoslovakia	f/ 1,600	1,420	1,450	-	f/ 32.4	28.2	-	-	f/ 51,800	40,000	-	-
Denmark	946	1,025	1,152	1,096	55.9	62.1	53.0	56.6	52,881	63,696	61,040	62,004
Eire	118	144	146	150	45.9	41.7	42.5	43.3	5,413	6,000	6,200	6,500
Finland	280	345	341	348	28.2	23.2	22.6	28.0	7,900	8,000	7,700	9,737
France	1,897	1,807	2,367	2,000	27.9	27.0	23.2	28.8	53,015	48,803	55,000	57,500
Germany	3,120	-	-	-	41.7	-	-	-	130,000	-	-	-
Greece	511	405	494	508	18.1	17.0	12.6	16.7	9,267	6,900	6,200	8,500
Hungary	1,163	1,275	1,300	-	25.9	15.9	16.9	-	30,178	20,267	22,000	-
Italy f/	f/ 480	587	600	620	f/ 21.2	18.0	14.3	17.7	f/ 10,182	10,553	8,600	11,000
Netherlands	107	153	169	132	55.5	52.9	48.4	49.2	5,934	8,100	8,175	6,500
Norway	143	100	103	100	38.2	43.1	38.8	40.9	5,467	4,314	4,000	4,100
Poland	2,570	-	-	-	29.6	-	-	-	76,000	-	-	-
Portugal	175	316	345	320	10.2	15.2	8.7	10.9	1,783	4,800	3,000	3,500
Rumania	2,030	-	-	-	13.8	-	-	-	28,000	-	-	-
Spain	g/ 4,549	3,674	3,825	3,830	g/ 21.3	23.9	18.3	20.9	g/ 97,059	87,876	70,000	80,000
Sweden	252	221	247	217	39.5	38.0	32.7	40.9	9,951	8,396	8,082	8,869
Switzerland	13	75	70	70	33.1	39.1	35.7	34.3	430	2,930	2,500	2,400
United Kingdom	934	2,211	2,060	2,087	39.2	41.4	36.7	45.0	36,596	91,625	75,530	93,987
Yugoslavia	1,045	-	-	-	-	18.0	-	-	18,800	-	-	-
Estimated total e/	23,110	21,370	23,010	22,230	-	-	-	-	665,000	585,000	555,000	635,000
U.S.S.R. (Europe and Asia)	26,600	17,000	20,500	-	16.0	12.4	15.1	-	425,000	210,000	310,000	-

Asia:												
Iran	f/ 1,545	-	-	-	f/ 23.1	-	-	-	f/ 35,728	39,775	35,636	40,000
Iraq	f/ 1,932	2,000	2,100	1,656	f/ 11.6	14.2	13.8	13.9	23,635	28,476	29,000	23,000
Lebanon	h/	54	54	54	h/	22.1	21.3	23.0	h/	1,194	1,148	1,240
Palestine	571	-	-	-	5.7	-	-	-	3,238	2,943	-	-
Syria	h/ 793	916	902	914	h/ 19.4	14.2	10.0	12.6	h/ 15,386	12,975	9,000	11,500
Turkey	4,592	4,016	4,302	4,670	20.9	21.2	15.9	19.3	96,129	85,000	68,212	90,000
China	f/ 16,000	16,084	15,818	15,560	f/ 21.7	20.0	22.0	22.7	f/347,000	322,179	347,863	353,565
Manchuria	f/ 222	-	-	-	f/ 29.1	-	-	-	f/ 6,462	-	-	-
India i/	6,298	6,727	-	-	16.5	14.6	-	-	103,619	98,000	106,000	102,000
Japan	1,888	2,011	1,933	-	34.6	17.8	24.6	-	65,402	35,725	47,518	-
Korea	2,674	-	-	-	19.5	-	-	-	52,096	-	-	-
Estimated total e/	37,750	37,550	37,690	37,730	-	-	-	-	769,000	686,000	708,000	748,000
Africa:												
Algeria	3,051	1,725	1,800	2,410	10.9	17.7	9.4	17.0	33,132	30,500	17,000	41,000
Egypt	276	254	246	228	38.8	32.1	31.7	33.5	10,697	8,157	7,793	7,644
French Morocco	4,448	2,498	3,850	3,650	12.0	15.7	15.6	16.0	53,279	39,109	60,000	58,500
Tunisia	1,182	1,203	988	1,329	7.7	6.0	5.1	3.4	9,048	7,165	5,000	4,500
Union of South Africa	f/ 86	105	105	-	f/ 18.4	18.2	21.0	-	1,555	1,910	2,200	-
Estimated total e/	10,290	7,390	8,380	-	-	-	-	-	121,000	102,000	104,000	127,000
South America:												
Argentina	1,286	2,427	1,630	1,700	17.6	22.2	24.5	17.6	22,586	53,801	40,000	30,000
Chile	184	147	150	163	27.4	30.9	32.9	27.6	5,041	4,541	4,930	4,500
Uruguay	44	56	74	75	14.8	9.4	9.1	12.0	649	526	674	900
Estimated total e/	2,140	3,330	2,620	2,660	-	-	-	-	38,000	70,000	58,000	48,000
Oceania:												
Australia	648	748	839	900	18.0	16.1	25.9	17.8	11,651	12,080	21,726	16,000
New Zealand	24	53	65	60	39.7	39.8	39.6	40.8	952	2,111	2,575	2,448
Total	672	801	904	960	-	-	-	-	12,603	14,191	24,301	18,448
Estimated world total e/	116,050	104,530	111,940	116,300	-	-	-	-	2,363,000	2,085,000	2,185,000	2,425,000

a/ Years shown refer to years of harvest in the Northern Hemisphere. Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1948 is combined with preliminary forecasts for the Southern Hemisphere harvests which begins late in 1948 and ends early in 1949. b/ Figures refer to harvested areas as far as possible. c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. d/ Revised estimates for Northern Hemisphere countries, for Southern Hemisphere, preliminary forecasts based largely on acreage and weather conditions to date. e/ Estimated totals, which in the case of production, are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. f/ Average of less than 5 years. g/ Figure for 1935 only. h/ Estimates for Syria and Lebanon not shown separately during this period. i/ Includes Pakistan. Estimates for reporting areas only. Allowances for non-reporting areas, not shown, are included in estimated total for Asia.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service Officers, results of office research, or other information. Prewar estimates for countries having changed boundaries have been adjusted to conform to present bounderies.

OATS: Acreage, yield per acres, and production in specified countries, year of harvest, average 1935-39, annual 1946-48 a/

Continent and country	Acreage b/				Yield per acre c/				Production			
	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/	Average 1935-39	1946	1947	1948 d/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	Bushels	Bushels	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North America:												
Canada e/	13,246	12,075	11,048	11,200	25.5	30.7	25.2	31.9	338,071	371,069	278,670	357,703
Mexico	29	79	77	138	16.0	19.2	22.4	18.0	465	1,516	1,722	2,480
United States	35,761	43,205	38,648	40,970	29.2	34.7	31.5	36.4	1,045,329	1,497,904	1,215,970	1,492,957
Estimated total f/	49,040	55,360	49,780	52,310	-	-	-	-	1,384,000	1,871,000	1,496,000	1,853,000
Europe:												
Austria	686	530	555	570	41.9	29.2	30.6	35.1	28,746	15,500	17,000	20,000
Belgium	548	519	618	515	74.7	79.0	67.2	70.9	40,946	41,000	41,500	36,500
Bulgaria	362	415	410	-	24.9	19.3	-	-	9,000	8,000	-	-
Czechoslovakia	1,830	1,482	1,550	-	46.4	39.1	-	-	85,000	58,000	-	-
Denmark	932	855	847	823	75.3	87.5	70.9	72.8	70,205	74,777	60,075	59,938
Eire	571	831	826	883	68.8	58.1	55.3	61.2	39,265	48,251	45,698	54,000
Finland	1,030	793	915	986	43.7	31.5	34.0	42.9	45,000	25,000	31,100	42,300
France	8,089	6,200	6,452	6,050	40.6	41.9	32.5	38.8	328,653	259,762	210,000	235,000
Germany	5,200	-	-	-	60.6	-	-	-	315,000	-	-	-
Greece	346	257	311	345	24.5	24.1	17.4	24.6	8,479	6,200	5,400	8,500
Hungary	558	500	600	-	35.9	27.3	25.0	-	20,042	13,640	15,000	-
Italy	g/ 1,065	1,095	1,187	1,175	g/ 36.6	29.0	25.9	30.6	g/ 38,980	31,733	30,791	36,000
Luxembourg	65	53	60	52	44.8	48.8	46.7	48.1	2,910	2,584	2,800	2,500
Netherlands	360	438	404	350	71.6	66.8	57.0	62.0	25,769	29,266	23,011	21,700
Norway	212	206	195	190	61.0	62.1	53.3	63.2	12,940	12,801	10,400	12,000
Poland	4,900	-	-	-	41.6	-	-	-	204,000	-	-	-
Portugal	607	722	603	605	10.8	20.1	11.6	10.7	6,555	14,483	7,000	6,500
Rumania	1,620	-	-	-	23.1	-	-	-	37,500	-	-	-
Spain	h/ 1,848	1,587	1,600	1,605	h/ 21.3	26.9	21.9	23.7	h/ 39,369	42,666	35,000	38,000
Sweden	1,641	1,313	1,308	1,209	53.1	41.1	35.7	44.5	87,198	53,927	46,722	53,785
Switzerland	28	99	85	82	56.9	62.2	61.2	58.5	1,593	6,159	5,200	4,800
United Kingdom	2,431	3,567	3,308	3,367	57.0	57.0	53.1	60.3	138,628	203,210	175,560	202,930
Yugoslavia	893	-	-	-	24.5	-	-	-	21,900	-	-	-
Estimated total f/	35,850	32,240	32,650	32,430	-	-	-	-	1,608,000	1,310,000	1,195,000	1,368,000
U.S.S.R. (Europe and Asia)	49,500	33,500	36,000	-	23.5	17.9	22.8	-	1,165,000	600,000	820,000	-

Asia:												
Syria i/	24	-	-	-	27.6	-	-	-	662	-	-	-
Turkey	636	644	670	687	26.6	25.6	18.1	30.6	16,893	16,500	12,126	21,000
China	g/ 2,603	2,365	2,329	2,314	g/ 22.9	20.5	20.8	24.1	g/ 59,608	48,443	48,429	55,883
Japan	310	-	-	-	37.0	-	-	-	11,481	-	-	-
Korea	g/ 242	-	-	-	g/ 11.2	-	-	-	g/ 2,718	-	-	-
Estimated total f/	4,010	3,910	4,070	4,090	-	-	-	-	96,000	81,000	82,000	100,000
Africa:												
Algeria	465	324	371	445	23.4	27.7	16.2	24.3	10,859	8,970	6,000	10,800
French Morocco	104	53	95	107	26.5	38.2	25.2	33.6	2,751	2,025	2,391	3,593
Tunisia	84	71	-	-	19.9	14.0	-	-	1,674	992	600	550
Union of South Africa	g/ 544	781	781	-	g/ 13.3	10.5	15.6	-	6,966	8,234	12,155	-
Estimated total f/	1,200	1,240	1,320	1,410	-	-	-	-	22,000	21,000	21,000	26,000
South America:												
Argentina	1,974	1,990	1,648	1,700	25.4	23.7	27.3	25.9	50,182	47,158	45,000	44,000
Chile	279	205	233	240	27.5	22.6	24.7	25.0	7,670	4,641	5,749	6,000
Uruguay	213	107	129	130	14.6	13.2	17.1	14.6	3,100	1,410	2,203	1,900
Estimated total f/	2,490	2,330	2,040	2,100	-	-	-	-	62,000	54,000	54,000	53,000
Oceania:												
Australia	1,593	1,728	2,105	1,900	14.7	11.3	24.2	14.5	23,351	19,456	50,871	27,500
New Zealand	63	55	51	50	56.2	41.1	56.4	55.0	3,539	3,358	2,875	2,750
Total	1,656	1,783	2,156	1,950	-	-	-	-	26,890	22,814	53,746	30,250
Estimated world total f/	143,750	130,360	128,020	136,290	-	-	-	-	4,364,000	3,960,000	3,722,000	4,335,000

a/ Years shown refer to years of harvest in the Northern Hemisphere. **Harvests of Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow: thus, the crop harvested in the Northern Hemisphere in 1948 is combined with preliminary forecasts for the Southern Hemisphere harvests which begins late in 1948 and ends early in 1949.** b/ **Figures refer to harvested areas as far as possible.** c/ Yield per acre calculated from acreage and production data shown, except for incomplete periods. d/ Revised estimates for Northern Hemisphere countries; for Southern Hemisphere preliminary forecasts, based largely on acreage and weather conditions to date. e/ Production and yield reported in bushels of 34 pounds. f/ Estimated totals, which in the case of production are rounded to millions, include allowances for any missing data for countries shown and for other producing countries not shown. g/ Average of less than 5 years. h/ Figure for 1935 only. i/ Includes estimate for Lebanon.

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WORLD'S PRODUCTION OF HOPS CONTINUES BELOW PREWAR LEVEL 1/

The 1948 production of hops in reporting countries which before the war accounted for more than 90 percent of the world's total is now indicated at approximately 117.3 million pounds, according to the Office of Foreign Agricultural Relations. This compares with 111.1 million pounds produced in the same countries in 1947 and with the prewar (1934-38) average of 120.9 million pounds for approximately the same areas. However, marked shifts have occurred in a number of countries both in the levels of production and trade.

Some recovery from wartime lows is reported in several of the important producing areas in central Europe, but the estimated harvest in that area is still about 40 percent under the prewar average. On the other hand, production in the United States (November 10 estimate), while virtually unchanged from a year ago, is still substantially above the prewar average. The crop in the United Kingdom is reported to be well above both that of 1947 and the prewar level.

Table I. World Production of Hops, Average 1934-38 1/, Annual 1945-48 a/

Country	Average 1934-38	1945	1946	1947	1948
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United States	38,977	56,772	53,171	50,098	50,125
Canada	1,612	1,728	2,502	2,491	1,721
United Kingdom	28,023	31,685	31,662	29,120	33,600
Czechoslovakia 3/	21,462	8,204	11,658	10,320	12,125
Germany	20,033	-	-	-	-
Bizone Area	-	-	10,362	12,346	12,566
France	4,936	2,940	2,584	2,072	1,874
Belgium	2,659	1,187	1,621	1,377	1,543
Other Europe 4/	10,385	-	-	-	-
Australia	2,304	5/	1,822	2,325	2,498
New Zealand	875	900	544	753	987
Union of South Africa	5/	183	214	235	290
World Total 6/	120,881	103,554	116,140	111,137	117,329

1/ International Yearbook of Agricultural Statistics, 1941-42 to 1945-46, Rome, Italy, 1947. 2/ Official and trade sources. 3/ 4-year average. 4/ Includes (in thousands of pounds) Austria 108, Hungary 146, Poland 3,907, Rumania 42, Yugoslavia 3,977, and U.S.S.R. 2,205. 5/ Not reported. 6/ Excludes "Other Europe," for which no postwar crop figures are available.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

CEYLON'S RICE IMPORTS GAIN, BUT STILL BELOW PREWAR

Rice imports into Ceylon during the January-September period of 1948 equalled 775 million pounds compared with 507 million during the corresponding period of the preceding year, and with 589 million pounds during the calendar year 1947. Receipts during the period exceeded slightly 80 percent of the rice allocated to Ceylon during 1948 by the International Emergency Food Council. Although imports were larger than in 1947, they remained substantially below prewar takings.

Imports during the October-December quarter, 1948, were becoming increasingly difficult for Ceylon to obtain, primarily because of restriction of and higher prices demanded for Burma rice. In lieu of Burma allocations, some rice may be imported from Italy toward the end of the year.

CEYLON: Rice imports by country, January-September 1948, with comparisons

Country of origin	Average 1935-39	1947	1948			
			January-March	April-June	July-September	January-September
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
British India	191	a/	0	a/	a/	a/
Burma	794	318	55	276	251	582
Siam	202	0	0	0	0	0
Fr. Indochina	23	0	0	0	0	0
Egypt	0	79	86	43	45	174
Brazil	0	177	0	19	0	19
Other countries ..	8	15	0	0	0	0
Total	1,218	589	141	338	296	775

a/ Less than 1,000,000 pounds.

Ceylon Customs Returns.

FATS AND OILS

ARGENTINE TALLOW AND CATTLE-FAT EXPORTS

The following table shows Argentine tallow and cattle-fat exports for September 1948 with comparisons:

ARGENTINA: Tallow and cattle-fat exports,
September 1948 with comparisons
(Gross weight)

Country of destination	Average 1935-39	1947	January-September 1947	January-September 1948 a/	September 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Canada	7	-	-	6,380	-
Cuba	377	15	15	1,984	-
Mexico	11	659	656	-	-
Others	9,935	799	799	566	63
Total	10,330	1,473	1,470	8,930	63
South America	1,914	4,807	4,297	4,675	26
Europe:					
Belgium	2,974	1,596	1,145	470	-
France	937	1,238	1,238	3,886	-
Italy	2,082	3,481	3,128	13	-
Netherlands	7,875	2,988	2,988	553	-
Spain	1,296	8,106	3,986	173	-
Sweden	1,695	2,513	2,513	-	-
Switzerland	1,133	1,202	1,137	481	-
United Kingdom	17,903	19,374	15,489	29,505	4,101
Others	16,767	2,798	1,858	2,073	-
Total	52,662	43,296	33,482	37,154	4,101
Japan	21	-	-	6,890	-
Soviet Union	-	4,508	4,508	-	-
Others	313	661	518	646	-
Grand total	65,240	54,745	44,275	58,295	4,190

a/ Preliminary.

Compiled from official sources and consular reports.

ARGENTINE LARD
EXPORTS

The following table shows Argentine lard exports for September 1948 with comparisons:

ARGENTINA: Lard exports, September 1948 with comparisons
(gross weight)

Country of destination	Average 1935-39	1947	January-September 1947	January-September 1948 a/	September 1948 a/
	Short tons	Short tons	Short tons	Short tons	Short tons
North America:					
Cuba	-	-	-	803	63
Netherlands West Indies	-	583	583	1	-
Others	-	141	141	10	10
Total	-	724	724	814	73
South America	685	3,349	2,816	974	-
Europe:					
Hungary	-	2,389	2,389	446	-
Italy	127	4,234	4,234	817	-
United Kingdom	6,673	3,755	3,755	8,998	2,327
Others	919	585	582	170	-
Total	7,719	10,963	10,960	10,431	2,327
Others	163	157	157	27	-
Grand total	8,567	15,193	14,657	12,246	2,400

a/ Preliminary.

Compiled from official sources and consular reports.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets, converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the U. S. gulf-port average

Market location, kind, and quality	Date 1948	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		Kantar			
Ashmouni, Good	12-9	99.05 lbs.	Tallari	49.85	41.59
Ashmouni, F.G.F.	"	"	"	47.10	39.30
Karnak, Good	"	"	"	86.95	72.55
Karnak, F.G.F.	"	"	"	(not	quoted)
Bombay		Candy			
Jarila, Fine	"	784 lbs.	Rupee	610.00	23.47
Broach, Fine	"	"	"	a/ 650.00	25.01
Kampala, East African	"	"	"	(not	available)
Karachi		Maund			
4F Punjab, S.G., Fine	12-8	82.28 lbs.	"	72.00	26.40
289F Sind, S.G., Fine	"	"	"	87.80	32.19
289F Punjab, S.G., Fine	"	"	"	94.00	34.46
Buenos Aires		Metric ton			
Type B	12-9	2204.6 lbs.	Peso	a/3350.00	45.24
Lima		Sp. quintal			
Tanguis, Type 5	12-7	101.4 lbs.	Sol	a/ 180.00	27.37
Pima, Type 1	"	"	"	279.00	42.42
Recife		Arroba			
Mata, Type 4	12-9	33.07 lbs.	Cruzeiro	187.00	30.77
Sertao, Type 5	"	"	"	195.00	32.08
Sao Paulo					
Sao Paulo, Type 5	"	"	"	204.00	33.56
Torreon		Sp. quintal			
Middling, 15/16"	"	101.4 lbs.	Peso	182.00	26.06
Houston-Galveston-New Orleans av. Mid. 15/16"	"	Pound	Cent	XXXXX	31.83

Quotations of foreign markets reported by cable. U. S. quotations from designated spot markets.

a/ Nominal.

WORLD CACAO--(Continued from Page 466)

Forecasts place production in the British West Indies (Jamaica, Grenada, Trinidad and Tobago) at slightly more than the 21,000,000 pounds estimated for 1947-48. Little progress appears to have been made against witches'-broom disease in Trinidad and Tobago. This disease has been responsible for a drop in production in these Islands to about one-third of the 1935-39 average of 32,000,000 pounds annually. A slight increase in production is expected in Jamaica. No forecast is available for Grenada, but the current crop probably will approximate the 1947-48 production of 6,000,000 pounds, since weather conditions are believed to have been favorable. No witches'-broom has been reported in Jamaica and Grenada.

Asia and Oceania. Ceylon's 1948-49 production is forecast at 5,500,000 pounds, which is nearly a million pounds larger than the 1947-48 crop, but still below the 1935-39 average of about 8,000,000 pounds annually. Production in the Netherlands Indies, currently estimated at 1,000,000 pounds, is not sufficient to meet domestic requirements. Since the cacao is a flavor grade, some of it may be exported, provided it can be replaced by imports of ordinary grade cacao. Only fragmentary information is available on the cacao situation in New Guinea, New Hebrides and Western Samoa. It appears that Western Samoa may have a crop of 5,600,000 pounds in 1948-49, and New Guinea and New Hebrides, 400,000 and 3,000,000 pounds, respectively.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, J. Barnard Gibbs, Helen B. Whitmore, Mary E. Long, and Constance H. Farnworth.

ECONOMIC DEVELOPMENTS

Uruguayan export authorities have just opened a quota for the exportation of 50,000 metric tons of wheat at the most favorable exchange rate, 1.88 pesos per U. S. $1.00 (53.19¢ per peso), according to an airgram from the American Embassy, Montevideo. The basic buying rate for the U. S. dollar is 1.519 pesos 65.83¢ per peso), but several intermediate rates have been set for proceeds of certain exports, thus constituting an indirect subsidization of such exportation.

After several years of declining acreage and below-average wheat production, Uruguay's policy of fixed prices to farmers, implemented by direct Government buying from the farmers, last year resulted in a reversal of its former import position. The prices for last year's wheat crop were

18.50 to 19.10 pesos per 100 kilograms ($3.31 to $3.42 per bushel at the basic buying rate) to farmers and a subsidized price of 14.80 pesos per 100 kilograms ($2.65 per bushel at the basic rate) to millers. The price to farmers for the 1948-49 crop has been set at 170 pesos per ton ($3.05 per bushel at the basic rate) for wheat delivered to Montevideo in bulk. Last year's crop provided an exportable surplus which permitted repayment to Argentina of an earlier wheat loan of 8,500 metric tons and exportation of about 60,000 metric tons of flour, in terms of wheat, to Brazil.

Although this year's crop is just beginning to be harvested, it is anticipated that there will again be a surplus of at least 50,000 metric tons of wheat. In view of its policy of subsidization of the wheat producer, the extraordinarily large crops of this year and last constitute a matter of concern to the Urguayan Government.

WORLD SOYBEANS--(Continued from Page 463)

Cultivation of soybeans in Australia is still in the experimental stage and is confined to certain districts in New South Wales and Queensland where production totaled only 500 bushels in the 1947-48 crop year.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, R. S. Kifer, Regina Hoyle, and Helen Francis.

WORLD OATS AND BARLEY--(Continued from Page 468)

barley and oats in Australia and a larger than average barley harvest in South America. The production of oats in the latter area is expected to be about 15 percent below the 1935-39 average, principally because of reduced plantings.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Robert L. Gastineau, Judith E. Downey, Lois B. Bacon, and Constance Farnworth.